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APPLICATION FOR UNITED STATES LETTERS PATENT

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TITLE:

Method and System for Intelligent  
Routing Based on Presence Detection

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METHOD AND SYSTEM FOR INTELLIGENT ROUTING BASED ON  
PRESENCE DETECTION

CROSS-REFERENCE TO RELATED APPLICATIONS

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The present application is related to the application entitled "METHOD AND SYSTEM FOR MULTIMODAL PRESENCE DETECTION", Attorney Docket No. T00359, filed on the same day as the present application, whose disclosure  
10 is hereby incorporated by reference into the disclosure of the present application.

TECHNICAL FIELD

15 The present invention relates to methods and systems for routing messages.

BACKGROUND OF THE INVENTION

20 Presence management refers to the task of identifying whether a given user is available to receive a communication. The concept originated, at least in part, in instant messaging products such as those provided by AOL, Yahoo and MSN. In a typical scenario, a  
25 user's availability or presence is registered into an application-specific database in response to the user logging in to a particular software application. When other users wish to contact the user, the availability is obtained from the database using an application-specific  
30 protocol. In these scenarios, presence management is tied to particular software applications (e.g. AOL, Yahoo, MSN, and instant messaging products). The

applications establish presence, with some user control,  
when the user logs in to an application. This method  
limits the information to the particular applications,  
and is not usable from outside the application for which  
5 it was designed.

It is believed that just-in-time applications will  
become a more important component for increasing the  
efficiency of business operations. In some systems,  
workflow and process management components exist that  
10 define rules for routing messages. Sometimes, messages  
can be translated and sent to various devices. In many  
such systems, rules are defined to route a request to an  
alternative responsibility holder or approver if the  
request has not been answered for a predefined amount of  
15 time or if the rules were changed while the approver is  
absent. Because the business systems do not detect  
presence of the users and approvers, alternative routing  
is not defined in advance.

## 20 BRIEF DESCRIPTION OF THE DRAWINGS

The invention is pointed out with particularity in  
the appended claims. However, other features of the  
invention will become more apparent and the invention  
25 will be best understood by referring to the following  
detailed description in conjunction with the accompanying  
drawings in which:

FIG. 1 is a schematic block diagram of an embodiment  
of a system to provide intelligent routing based on  
30 presence information; and

FIG. 2 is a flow chart of an embodiment of a method  
performed by the routing system.

## DETAILED DESCRIPTION OF PREFERRED EMBODIMENTS

Briefly, embodiments of the present invention  
5 provide an improved routing solution that uses a presence  
management and detection Web service in combination with  
communication tools having embedded presence management  
devices. This approach facilitates real-time detection  
10 of available approvers and their active devices, and  
dynamic selection of a desirable route to process the  
requests. The desirable route may comprise either a  
near-optimal route, or in an exemplary embodiment, an  
optimal route to process the request faster and more  
efficiently. The herein-disclosed routing solution is  
15 well-suited for business applications.

FIG. 1 is a schematic block diagram of an embodiment  
of a system to provide intelligent routing based on  
presence information. Consider a user 10 who accesses a  
telecommunication network 12 such as the Internet or  
20 another computer network. The user 10 may access the  
telecommunication network 12 using either a telephone 13  
via a telephone network 14 and a gateway 16, a computing  
device such as a computer 20 running a software  
application 22, or a presence-enabled device 24. For any  
25 of the aforementioned ways that the user 10 accesses the  
telecommunication network 12, information indicating the  
presence of the user is compiled and made available by a  
node 26 of the telecommunication network 12. The node 26  
may comprise a computer server 30 which provides a Web  
30 service 32 defined as a distributed service accessible  
over the telecommunication network 12 (e.g. the Internet)  
using ubiquitous protocols such as Simple Object Access

Protocol (SOAP) and Extensible Markup Language (XML) over Hypertext Transfer Protocol (HTTP). The computer server 30 may comprise a JAVA™ 2 Platform Enterprise Edition (J2EE)/.NET application server, for example.

5        This disclosure contemplates a multiplicity of users of the telecommunication network 12 whose presence information is compiled and made available using the Web service 32. For example, the Web service 32 may provide presence information for a user 34 having two associated  
10 devices 36 and 38, and a user 40 having an associated device 42. Examples of the devices 36, 38 and 42 include, but are not limited to, those described in association with the user 10.

      The Web service 32 decouples presence information  
15 from a particular application, and makes the presence information available as a network function. Separating presence management as a component service available from the telecommunication network 12 facilitates flexibility both for users to publish their presence information and  
20 for consuming applications to consume the presence information. As a result, cross-application services are enabled. For example, indicating unavailability on a personal computer internet messaging (PC-IM) client can be interpreted as a user directive to the  
25 telecommunication network 12 to hold off cellular telephone calls and/or to take messages.

      The Web service 32 can be used in multiple applications, including but not limited to instant messaging, video conferencing, chat, business-to-business  
30 applications such as document routing for approval, and routing notifications to an appropriate device. The presence information may be published in multiple modes,

including but not limited to a Web browser, a Voice XML application, a mobile telephone, and a specialized presence device. The presence information may be either explicitly updated by the user or implicitly handled by various devices and/or software applications.

The presence information can be consumed by multiple devices, including but not limited to a Web browser, a mobile telephone, a personal computer, a personal digital assistant and a Web tablet. Independent of the actual presence information, the service may provide other information such as updatable and consumable user availability information 44, user/device profile and preference information 46, device status information and user location information.

A routing system 50 intelligently routes messages and documents based on presence information provided by the Web service 32. An embodiment of a method performed by the routing system 50 is described with reference to FIG. 2.

As indicated by block 60, the method comprises receiving a message which is to be routed to one of a plurality of authorized parties. The message may be received via the telecommunication network 12 or another network. Although the authorized parties may comprise any number of users, for purposes of illustration and example consider the authorized parties comprising a first authorized party, a second authorized party and a third authorized party. Further consider that the first authorized party is the user 34, the second authorized party is the user 10 and the third authorized party is the user 40.

The message may comprise a request which is to

approved. In this case, the first authorized party is a main approver of the request, and the second authorized party is a secondary approver of the request. In general, the authorized parties may comprise one or more  
5 secondary approvers. The secondary approvers may be ranked to provide an order for attempting to detect their presence. For purposes of illustration and example, consider the second authorized party being ranked ahead of the third authorized party.

10 As indicated by block 62, the method comprises polling the Web service 32 at least once to detect for a presence of the first authorized party. If the presence of the first authorized party is not immediately detected by the Web service 32, the Web service 32 may be  
15 repeatedly contacted either at periodic or aperiodic intervals to detect for the presence of the first authorized party.

As indicated by block 64, the method comprises determining if the presence of the first authorized party  
20 is determined within an allocated time interval. If it is determined that the presence of the first authorized party remains undetected over the allocated time interval, an act of selecting another authorized party from the plurality of authorized parties is performed as  
25 indicated by block 66. Preferably, the selection is made automatically based on the highest ranked party whose status has yet to be determined by polling the Web service 32. Returning to the above example, this act would comprise selecting the second authorized party at  
30 this time.

As indicated by block 70, an act of polling the Web service at least once is performed to detect for a

presence of the selected authorized party. As indicated by block 72, the method comprises determining if the presence of the selected authorized party is detected. If the presence is undetected, flow of the method is  
5 directed back to block 66 to select another authorized party from the list, and poll the Web service 32 to detect for its presence.

In response to detecting the presence of an authorized party, either in block 64 or block 72, an act  
10 of routing the message to an active communication device associated with the authorized party is performed as indicated by block 74. Optionally, as indicated by block 76, the method may further comprise formatting the presentation of the message for the active communication  
15 device prior to routing the message. The message may be coded in a markup language, such as XML for example.

Beneficially, the presence of each authorized party is detectable by the Web service for a plurality of different communication devices associated therewith.  
20 Further, the presence of the each authorized party is detectable independent of whether the authorized party logs in to a particular software application (e.g. an instant messaging application). Still further, the Web service preferably provides presence information for a  
25 plurality of different software applications, one of which being the herein-disclosed routing application.

A more specific example is given to further motivate use of embodiments of the herein-disclosed routing method and system. Consider an operator submitting a purchase  
30 order to the routing system 50. The order needs to be approved by her department manager (user 34), who is the main approver. The order is urgent: it must be approved



within two hours.

The routing system 50 contacts the Web service 32 to inquire about the presence of the main approver. The main approver is unavailable and all his devices 36 and 38 are inactive. The routing system 50 continues to poll the Web service 32 every 15 minutes. With the main approver's presence remaining undetected after one and a half hours, a ranked list of alternative approvers is activated. The routing system 50 sends a request to the Web service 32 to determine the presence of the top alternative approver (user 10). The devices of the top alternative approver are polled, and it is determined that his personal digital assistant (PDA) is active. The PDA is determined to be allowable to receive alerts from the routing system 50. The routing system 50 formats the approval request for the PDA, and sends the request to the PDA. The user 10 may then approve the purchase order using the PDA.

Several embodiments including preferred embodiments of a method and system for intelligent routing based on presence detection are disclosed herein.

The proposed presence-based routing solution may be a component of various business applications, from supply chain management to procurement and billing. After receiving a request that needs to be routed to a process owner, the routing system contacts a Web service to detect presence and active devices for those authorized to approve a request. If the routing system is set up to operate in an automated mode, the availability of the main approver and his/her active device is checked. If available, the request is routed to the main approver's active device. If the presence of the main approver is

not detected and the time allocated for his/her approval expires, the presence Web service is polled to detect presence and active devices of the secondary or alternative approvers. Consequently, the routing system  
5 routes requests according to the rules set up in the presence-based routing applications.

The herein-disclosed method and system allows organizations to speed up business processes involving mobile and distributed work force. Additionally, the  
10 presence-based routing system can be built to be application-independent to work with various business systems, in contrast to current routing systems which are applications-driven.

The routing system 50 may comprise a computer system  
15 to perform the acts described herein. The computer system may be directed by computer-readable program code stored by a computer-readable medium. Similarly, the acts performed by the node 26 may be directed by computer-readable program code stored by a computer-  
20 readable medium.

It will be apparent to those skilled in the art that the disclosed invention may be modified in numerous ways and may assume many embodiments other than the preferred form specifically set out and described above.

25 Accordingly, it is intended by the appended claims to cover all modifications of the invention which fall within the true spirit and scope of the invention.

What is claimed is: